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What is a Workflow? Megan De Freitas - 2024-12-02 - FAQ

SalesPad Cloud's Workflow feature allows users to create intricate sequences of Batches and Rules for different document types to move through throughout the life of the document. This allows different types of sales documents to be processed differently, and it makes it easy for users to manage sales documents, keep track of a sales document's status, and take action based on the sales document's current status.

For more information on Workflow, check out our <u>documentation</u>.